Activity Guide –

PO321 – Processing Purchase Orders

State of Kansas

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Activity 1 - Exercise: Entering Procurement Card Information on Purchase Orders

Scenario

You are a **Buyer** for your agency. A **Requester** submitted a request for some books for your agency and the **Requisitioner** created a purchase requisition in SMART for the books. When creating the requisition, the **Requisitioner** removed the **Requestor's** procurement card information from the requisition. The requisition progressed through the SMART Auto Sourcing process and a purchase order was created.

As a **Buyer**, you review the purchase order and realize you are not sure if the vendor accepts purchase orders. You contact the vendor to ask if they accept purchase orders and the vendor states that they need a method of payment to accompany the purchase order. You need to enter the **Requestor's** procurement card information on the existing purchase order in SMART.

Menu Path

Purchasing → Purchase Orders → Add/Update POs

UPK Procedure

Entering Procurement Card Information on Purchase Orders

Job Aid

Not Applicable

Instructions

Use the appropriate steps from the previous Instructor led UPK Try It walkthrough to complete the exercise scenario in SMART. For fields in the Required Data table that require "User specific data", be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Required Data

Field	Value
Purchase Order Search page: Find an Existing Value	
Business Unit	17300 (Department of Administration)
PO ID	User specific data
* Click the **Search** button	
Maintain Purchase Order: Purchase Order	
* Click the **Use Procurement Card** link	
Procurement Card Information	
Card Number	************4478 (VISA)
* Click the **OK** button	
Maintain Purchase Order	

* Click the **Save** button	
* Click the **Home** link	

Classroom 1 - User Specific Data

User ID	Field	Value
User 1	PO ID	0000000004
User 2	PO ID	0000000005
User 3	PO ID	0000000006
User 4	PO ID	0000000007
User 5	PO ID	0000000008
User 6	PO ID	0000000009
User 7	PO ID	0000000010
User 8	PO ID	0000000011
User 9	PO ID	0000000012
User 10	PO ID	0000000013
User 11	PO ID	0000000014
User 12	PO ID	0000000015
User 13	PO ID	0000000016
User 14	PO ID	0000000017
User 15	PO ID	0000000018
User 16	PO ID	0000000019
User 17	PO ID	0000000020
User 18	PO ID	0000000021
User 19	PO ID	0000000022
User 20	PO ID	0000000023
User 21	PO ID	0000000024
User 22	PO ID	0000000025

Classroom 2 - User Specific Data

User ID	Field	Value
User 1	PO ID	0000000031
User 2	PO ID	0000000032
User 3	PO ID	0000000033
User 4	PO ID	0000000034
User 5	PO ID	0000000035
User 6	PO ID	0000000036
User 7	PO ID	0000000037
User 8	PO ID	0000000038
User 9	PO ID	0000000039
User 10	PO ID	0000000040
User 11	PO ID	0000000042

User 12	PO ID	0000000042
User 13	PO ID	0000000043
User 14	PO ID	0000000044
User 15	PO ID	0000000045
User 16	PO ID	0000000046
User 17	PO ID	0000000047
User 18	PO ID	0000000048
User 19	PO ID	0000000049
User 20	PO ID	0000000050
User 21	PO ID	0000000051
User 22	PO ID	0000000052

Classroom 3 - User Specific Data

User ID	Field	Value
User 1	PO ID	0000000055
User 2	PO ID	0000000056
User 3	PO ID	0000000057
User 4	PO ID	0000000058
User 5	PO ID	0000000059
User 6	PO ID	0000000060
User 7	PO ID	0000000061
User 8	PO ID	0000000062
User 9	PO ID	0000000063
User 10	PO ID	0000000064
User 11	PO ID	0000000065
User 12	PO ID	0000000066
User 13	PO ID	0000000067
User 14	PO ID	0000000068
User 15	PO ID	0000000069
User 16	PO ID	0000000070
User 17	PO ID	0000000071
User 18	PO ID	0000000072
User 19	PO ID	0000000073
User 20	PO ID	0000000074
User 21	PO ID	0000000075
User 22	PO ID	0000000076

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KANSAS

SMART
Statewide Management Accounting and Reporting Tool

Activity 2 - Exercise: Approving Purchase Orders

Scenario
You are a **Buyer** for your Agency. As part of your daily tasks, you review and approve purchase orders for your agency. In this scenario, you need to locate, review, and approve an existing purchase order in SMART.

Menu Path
Purchasing → Purchase Orders → Add/Update POs

UPK Procedure
Approving Purchase Orders

Job Aid
Not Applicable

Instructions
Use the appropriate steps from the previous Instructor led UPK Try It walkthrough to complete the exercise scenario in SMART. For fields in the Required Data table that require "User specific data", be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Required Data

Field	Value
Purchase Order Search page: Find an Existing Value	
Business Unit	17300 (Department of Administration)
PO ID	User specific data
* Click the **Search** button	
Purchase Order: Header	
* Review: Buyer	
Purchase Order: Details	
* Click the **Collapse Menu** button	
* Review: PO Qty, Price	
* Click the **Line Comments** button	
PO Line Comments	
* Review: PO Line Comments page	
* Click the **OK** button	
Purchase Order: Ship To/Due Date	
* Review: Ship To	
Purchase Order: Item Information	
* Review: Vendor information	

Purchase Order: Contract
* Review: Contract ID
Purchase Order: Receiving
* Review: Receiving Required, Inspection Required, Inspect ID
Purchase Order: Details
* Click the **Schedule** button
Schedules: Details
* Review: Details, Shipment, Receiving, Freight, RTV
Schedules: Details
* Click the **Distributions/ChartFields** button
Distributions for Schedule 1
* Review: ChartFields, Asset Information, Req Detail, Statuses
* Click the **OK** button
Schedules: Details
* Click the **Return to Main Page** link
Purchase Order
* Click the **Line Details** button – Line 1
Details for Line 1
* Click the **Expand All** link
* Review all information
* Click the **OK** button
Purchase Order
* Click the **Header Details** link
PO Header Details
* Review: Billing Location, Process Control Option (dispatch method for PO)
* Click the **OK** button
Purchase Order
* Click the **Approve** button   PO Status: Open   ☑
* Click the **Save** button
* Click the **Home** link

Classroom 1 - User Specific Data

User ID	Field	Value
User 1	PO ID	0000000085
User 2	PO ID	0000000086
User 3	PO ID	0000000087
User 4	PO ID	0000000088
User 5	PO ID	0000000089
User 6	PO ID	0000000090

User ID	Field	Value
User 7	PO ID	0000000091
User 8	PO ID	0000000092
User 9	PO ID	0000000093
User 10	PO ID	0000000094
User 11	PO ID	0000000095
User 12	PO ID	0000000096
User 13	PO ID	0000000097
User 14	PO ID	0000000098
User 15	PO ID	0000000099
User 16	PO ID	0000000100
User 17	PO ID	0000000101
User 18	PO ID	0000000102
User 19	PO ID	0000000103
User 20	PO ID	0000000104
User 21	PO ID	0000000105
User 22	PO ID	0000000106

Classroom 2 - User Specific Data

User ID	Field	Value
User 1	PO ID	0000000111
User 2	PO ID	0000000112
User 3	PO ID	0000000113
User 4	PO ID	0000000114
User 5	PO ID	0000000115
User 6	PO ID	0000000116
User 7	PO ID	0000000117
User 8	PO ID	0000000118
User 9	PO ID	0000000119
User 10	PO ID	0000000120
User 11	PO ID	0000000121
User 12	PO ID	0000000122
User 13	PO ID	0000000123
User 14	PO ID	0000000124
User 15	PO ID	0000000125
User 16	PO ID	0000000126
User 17	PO ID	0000000127
User 18	PO ID	0000000128
User 19	PO ID	0000000129
User 20	PO ID	0000000130
User 21	PO ID	0000000131

User ID	Field	Value
User 22	PO ID	0000000132

Classroom 3 - User Specific Data

User ID	Field	Value
User 1	PO ID	0000000137
User 2	PO ID	0000000138
User 3	PO ID	0000000139
User 4	PO ID	0000000140
User 5	PO ID	0000000141
User 6	PO ID	0000000142
User 7	PO ID	0000000143
User 8	PO ID	0000000144
User 9	PO ID	0000000145
User 10	PO ID	0000000146
User 11	PO ID	0000000147
User 12	PO ID	0000000148
User 13	PO ID	0000000149
User 14	PO ID	0000000150
User 15	PO ID	0000000151
User 16	PO ID	0000000152
User 17	PO ID	0000000153
User 18	PO ID	0000000154
User 19	PO ID	0000000155
User 20	PO ID	0000000156
User 21	PO ID	0000000157
User 22	PO ID	0000000158

Activity 3 - Walkthrough: Manually Budget Check a Purchase Order (Exception Process)

Scenario

You are a **Buyer** for your agency and you have a purchase order for work gloves in SMART. You have just received a notice from the **Requisitioner** advising that the price on the purchase order is a twenty-four hour sale price. In this rare circumstance, you need to use the exception process of bypassing the regularly scheduled budget check batch process to manually budget check the purchase order. You are manually budget checking the purchase order before the next batch process occurs to expedite the dispatch of the purchase order to the vendor.

Menu Path

Purchasing → Purchase Orders → Add/Update POs

UPK Procedure

Not applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to manually budget check a purchase order in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "User specific data", be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
Purchase Order Search page: Find an Existing Value	
Business Unit	17300 (Department of Administration)
PO ID	User specific data
* Click the **Search** button	
Purchase Order	
* Click the **Budget Check** button	Budget Status: Not Chk'd
* Click the **Save** button	
* Click the **Home** link	

Classroom 1 - User Specific Data

User ID	Field	Value
Instructor 1	PO ID	0000000160
Instructor 2	PO ID	0000000161
Instructor 3	PO ID	0000000162
User 1	PO ID	0000000163
User 2	PO ID	0000000164
User 3	PO ID	0000000165
User 4	PO ID	0000000166
User 5	PO ID	0000000167
User 6	PO ID	0000000168
User 7	PO ID	0000000169
User 8	PO ID	0000000170
User 9	PO ID	0000000171
User 10	PO ID	0000000172
User 11	PO ID	0000000173
User 12	PO ID	0000000174
User 13	PO ID	0000000175
User 14	PO ID	0000000176
User 15	PO ID	0000000177
User 16	PO ID	0000000178
User 17	PO ID	0000000179
User 18	PO ID	0000000180
User 19	PO ID	0000000181
User 20	PO ID	0000000182
User 21	PO ID	0000000183
User 22	PO ID	0000000184

Classroom 2 - User Specific Data

User ID	Field	Value
Instructor 1	PO ID	0000000186
Instructor 2	PO ID	0000000187
Instructor 3	PO ID	0000000188
User 1	PO ID	0000000189
User 2	PO ID	0000000190
User 3	PO ID	0000000191
User 4	PO ID	0000000192
User 5	PO ID	0000000193
User 6	PO ID	0000000194
User 7	PO ID	0000000195
User 8	PO ID	0000000196

User ID	Field	Value
User 9	PO ID	0000000197
User 10	PO ID	0000000198
User 11	PO ID	0000000199
User 12	PO ID	0000000200
User 13	PO ID	0000000201
User 14	PO ID	0000000202
User 15	PO ID	0000000203
User 16	PO ID	0000000204
User 17	PO ID	0000000205
User 18	PO ID	0000000206
User 19	PO ID	0000000207
User 20	PO ID	0000000208
User 21	PO ID	0000000209
User 22	PO ID	0000000210

Classroom 3 - User Specific Data

User ID	Field	Value
Instructor 1	PO ID	0000000211
Instructor 2	PO ID	0000000212
Instructor 3	PO ID	0000000213
User 1	PO ID	0000000214
User 2	PO ID	0000000215
User 3	PO ID	0000000216
User 4	PO ID	0000000217
User 5	PO ID	0000000218
User 6	PO ID	0000000219
User 7	PO ID	0000000220
User 8	PO ID	0000000221
User 9	PO ID	0000000222
User 10	PO ID	0000000223
User 11	PO ID	0000000224
User 12	PO ID	0000000225
User 13	PO ID	0000000226
User 14	PO ID	0000000227
User 15	PO ID	0000000228
User 16	PO ID	0000000229
User 17	PO ID	0000000230
User 18	PO ID	0000000231
User 19	PO ID	0000000232
User 20	PO ID	0000000233

User ID	Field	Value
User 21	PO ID	0000000234
User 22	PO ID	0000000235

Activity 4 - Walkthrough: Create a Purchase Order Change Order

Scenario
As a **Buyer** for your agency, you have a purchase order in SMART for five utility carts. Your agency's needs change and now you need to change the purchase quantity from five carts to ten carts. The purchase order has already been approved, and has been dispatched to the vendor. Use SMART to create a purchase order change order for the change in quantity.

Menu Path
Purchasing → Purchase Orders → Add/Update POs

UPK Procedure
Not applicable

Job Aid
Not Applicable

Instructions
Follow along with your instructor as he/she demonstrates how to create a purchase order change order in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "User specific data", be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
Purchase Order Search page: Find an Existing Value	
Business Unit	17300 (Department of Administration)
PO ID	User specific data
* Click the **Search** button	
Purchase Order	
* Click the **Purchase Order Change Order** button	
PO Status: Dispatched	
Quantity	10
* Click the **Line Comments** button	
PO Line Comments	
Comments	Increasing quantity from five carts to ten carts per Supervisor's request.
* Click the **OK** button	

Purchase Order
* Click the **Save** button
* Click the **Approve PO** button
* Click the **Save** button
* Click the **Home** link

Classroom 1 - User Specific Data

User ID	Field	Value
Instructor 1	PO ID	0000000238
Instructor 2	PO ID	0000000239
Instructor 3	PO ID	0000000240
User 1	PO ID	0000000241
User 2	PO ID	0000000242
User 3	PO ID	0000000243
User 4	PO ID	0000000244
User 5	PO ID	0000000245
User 6	PO ID	0000000246
User 7	PO ID	0000000247
User 8	PO ID	0000000248
User 9	PO ID	0000000249
User 10	PO ID	0000000250
User 11	PO ID	0000000251
User 12	PO ID	0000000252
User 13	PO ID	0000000253
User 14	PO ID	0000000254
User 15	PO ID	0000000255
User 16	PO ID	0000000256
User 17	PO ID	0000000257
User 18	PO ID	0000000258
User 19	PO ID	0000000259
User 20	PO ID	0000000260
User 21	PO ID	0000000261
User 22	PO ID	0000000262

Classroom 2 - User Specific Data

User ID	Field	Value
Instructor 1	PO ID	0000000264
Instructor 2	PO ID	0000000265
Instructor 3	PO ID	0000000266
User 1	PO ID	0000000267

User ID	Field	Value
User 2	PO ID	0000000268
User 3	PO ID	0000000269
User 4	PO ID	0000000270
User 5	PO ID	0000000271
User 6	PO ID	0000000272
User 7	PO ID	0000000273
User 8	PO ID	0000000274
User 9	PO ID	0000000275
User 10	PO ID	0000000276
User 11	PO ID	0000000277
User 12	PO ID	0000000278
User 13	PO ID	0000000279
User 14	PO ID	0000000280
User 15	PO ID	0000000281
User 16	PO ID	0000000282
User 17	PO ID	0000000283
User 18	PO ID	0000000284
User 19	PO ID	0000000285
User 20	PO ID	0000000286
User 21	PO ID	0000000287
User 22	PO ID	0000000288

Classroom 3 - User Specific Data

User ID	Field	Value
Instructor 1	PO ID	0000000290
Instructor 2	PO ID	0000000291
Instructor 3	PO ID	0000000292
User 1	PO ID	0000000293
User 2	PO ID	0000000294
User 3	PO ID	0000000295
User 4	PO ID	0000000296
User 5	PO ID	0000000297
User 6	PO ID	0000000298
User 7	PO ID	0000000299
User 8	PO ID	0000000300
User 9	PO ID	0000000301
User 10	PO ID	0000000302
User 11	PO ID	0000000303
User 12	PO ID	0000000304
User 13	PO ID	0000000305

User ID	Field	Value
User 14	PO ID	0000000306
User 15	PO ID	0000000307
User 16	PO ID	0000000308
User 17	PO ID	0000000309
User 18	PO ID	0000000310
User 19	PO ID	0000000311
User 20	PO ID	0000000312
User 21	PO ID	0000000313
User 22	PO ID	0000000314

Activity 5 - Walkthrough: Review a Purchase Order Change Order

Scenario
As a **Buyer** for your agency, you have an existing Purchase Order Change Order that you have entered in SMART. You receive a phone call from the vendor asking you to clarify the details of the Purchase Order Change Order. Use the Detail page in SMART to review the details of the existing Purchase Order Change Order.

Menu Path
Purchasing → Purchase Orders → Manage Change Orders → Review Change Orders

UPK Procedure
Not applicable

Job Aid
Not Applicable

Instructions
Follow along with your instructor as he/she demonstrates how to review purchase order change orders in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "User specific data", be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
Change Order Batch	
Business Unit	17300 (Department of Administration)
PO ID	User specific data
* Click the **Search** button	
Review Change Orders	
* Review all records in: Header Changes, Line Changes, Ship Changes	
First ◀ 1-10 of 19 ▶ Last	
* Click the **Home** link	

Classroom 1 - User Specific Data

User ID	Field	Value
Instructor 1	PO ID	0000000317
Instructor 2	PO ID	0000000318

User ID	Field	Value
Instructor 3	PO ID	0000000319
User 1	PO ID	0000000320
User 2	PO ID	0000000321
User 3	PO ID	0000000322
User 4	PO ID	0000000323
User 5	PO ID	0000000324
User 6	PO ID	0000000325
User 7	PO ID	0000000326
User 8	PO ID	0000000327
User 9	PO ID	0000000328
User 10	PO ID	0000000329
User 11	PO ID	0000000330
User 12	PO ID	0000000331
User 13	PO ID	0000000332
User 14	PO ID	0000000333
User 15	PO ID	0000000334
User 16	PO ID	0000000335
User 17	PO ID	0000000336
User 18	PO ID	0000000337
User 19	PO ID	0000000338
User 20	PO ID	0000000339
User 21	PO ID	0000000340
User 22	PO ID	0000000341

Classroom 2 - User Specific Data

User ID	Field	Value
Instructor 1	PO ID	0000000342
Instructor 2	PO ID	0000000343
Instructor 3	PO ID	0000000344
User 1	PO ID	0000000345
User 2	PO ID	0000000346
User 3	PO ID	0000000347
User 4	PO ID	0000000348
User 5	PO ID	0000000349
User 6	PO ID	0000000350
User 7	PO ID	0000000351
User 8	PO ID	0000000352
User 9	PO ID	0000000353
User 10	PO ID	0000000354
User 11	PO ID	0000000355

User ID	Field	Value
User 12	PO ID	0000000356
User 13	PO ID	0000000357
User 14	PO ID	0000000358
User 15	PO ID	0000000359
User 16	PO ID	0000000360
User 17	PO ID	0000000361
User 18	PO ID	0000000362
User 19	PO ID	0000000363
User 20	PO ID	0000000364
User 21	PO ID	0000000365
User 22	PO ID	0000000366

Classroom 3 - User Specific Data

User ID	Field	Value
Instructor 1	PO ID	0000000367
Instructor 2	PO ID	0000000368
Instructor 3	PO ID	0000000369
User 1	PO ID	0000000370
User 2	PO ID	0000000371
User 3	PO ID	0000000372
User 4	PO ID	0000000373
User 5	PO ID	0000000374
User 6	PO ID	0000000375
User 7	PO ID	0000000376
User 8	PO ID	0000000377
User 9	PO ID	0000000378
User 10	PO ID	0000000379
User 11	PO ID	0000000380
User 12	PO ID	0000000381
User 13	PO ID	0000000382
User 14	PO ID	0000000383
User 15	PO ID	0000000384
User 16	PO ID	0000000385
User 17	PO ID	0000000386
User 18	PO ID	0000000387
User 19	PO ID	0000000388
User 20	PO ID	0000000389
User 21	PO ID	0000000390
User 22	PO ID	0000000391

Activity 6 - Exercise: Create a Purchase Order Change Order

Scenario
You are a **Buyer** for your agency, and you have a purchase order in SMART for 12 bags of snow melt. Your agency is experiencing severe winter weather and you need to change the purchase quantity on the existing purchase order from 12 bags to 17 bags of snow melt. The purchase order has already been approved and dispatched. Use SMART to create a purchase order change order for the change in quantity.

Menu Path
Purchasing → Purchase Orders → Add/Update POs

UPK Procedure
Not Applicable

Job Aid
Not Applicable

Instructions
Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require "User specific data", be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Field	Value
Purchase Order Search page: Find an Existing Value	
Business Unit	17300 (Department of Administration)
PO ID	User specific data
* Click the **Search** button	
Purchase Order	
* Click the **Purchase Order Change Order** button	
Quantity	17
* Click the **Line Comments** button	
PO Line Comments	
Comments	Increasing quantity from 12 bags to 17 bags per request from Agency Director.
* Click the **OK** button	
Purchase Order	
* Click the **Save** button	
* Click the **Home** link	

Classroom 1 - User Specific Data

User ID	Field	Value
User 1	PO ID	0000000395
User 2	PO ID	0000000396
User 3	PO ID	0000000397
User 4	PO ID	0000000398
User 5	PO ID	0000000399
User 6	PO ID	0000000400
User 7	PO ID	0000000401
User 8	PO ID	0000000402
User 9	PO ID	0000000403
User 10	PO ID	0000000404
User 11	PO ID	0000000405
User 12	PO ID	0000000406
User 13	PO ID	0000000407
User 14	PO ID	0000000408
User 15	PO ID	0000000409
User 16	PO ID	0000000410
User 17	PO ID	0000000411
User 18	PO ID	0000000412
User 19	PO ID	0000000413
User 20	PO ID	0000000414
User 21	PO ID	0000000415
User 22	PO ID	0000000416

Classroom 2 - User Specific Data

User ID	Field	Value
User 1	PO ID	0000000421
User 2	PO ID	0000000422
User 3	PO ID	0000000423
User 4	PO ID	0000000424
User 5	PO ID	0000000425
User 6	PO ID	0000000426
User 7	PO ID	0000000427
User 8	PO ID	0000000428
User 9	PO ID	0000000429
User 10	PO ID	0000000430
User 11	PO ID	0000000431
User 12	PO ID	0000000432
User 13	PO ID	0000000433

User ID	Field	Value
User 14	PO ID	0000000434
User 15	PO ID	0000000435
User 16	PO ID	0000000436
User 17	PO ID	0000000437
User 18	PO ID	0000000438
User 19	PO ID	0000000439
User 20	PO ID	0000000440
User 21	PO ID	0000000441
User 22	PO ID	0000000442

Classroom 3 - User Specific Data

User ID	Field	Value
User 1	PO ID	0000000447
User 2	PO ID	0000000448
User 3	PO ID	0000000449
User 4	PO ID	0000000450
User 5	PO ID	0000000451
User 6	PO ID	0000000452
User 7	PO ID	0000000453
User 8	PO ID	0000000454
User 9	PO ID	0000000455
User 10	PO ID	0000000456
User 11	PO ID	0000000457
User 12	PO ID	0000000458
User 13	PO ID	0000000459
User 14	PO ID	0000000460
User 15	PO ID	0000000461
User 16	PO ID	0000000462
User 17	PO ID	0000000463
User 18	PO ID	0000000464
User 19	PO ID	0000000465
User 20	PO ID	0000000466
User 21	PO ID	0000000467
User 22	PO ID	0000000468

Activity 7 - Walkthrough: Create a Return To Vendor (RTV) Against a Purchase Order

Scenario

You are a **Buyer** for your agency. You receive an email from your agency receptionist advising you that she has received a damaged shipment of plastic coil binding. You need to create a Return To Vendor (RTV) transaction against the existing purchase order (and receipt) in SMART.

Note: A receipt must be made (items received in SMART) prior to being able to initiate the RTV.

Menu Path

Purchasing → Return To Vendor → Add/Update RTV

UPK Procedure

Not applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to create an RTV against an existing purchase order in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "User specific data", be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Field	Value
Return To Vendor Search: Add a New Value	
Business Unit	17300 (Department of Administration)
* Click the **Add** button	
RTV	
* Click the **Select Receipt** link	
Select Receipt	
PO No.	User specific data
Receipt No	User specific data
* Click the **Search** button	
Select Receipt: Receipt Lines	
* Click the **Sel** checkbox	
* Click the **OK** button	

RTV: RTV Lines	
Action	Credit
Disposition	Ship
Reason	DAM - Damaged
* Click the **RTV Details** button for the RTV Line	
Distribution Details: Distributions	
Vendor Returned Qty	3
* Click the **OK** button	
RTV	
* Click the **Save** button	
* Review **RTV ID** and **Status** values	
* Click the **Ship RTV** button	
* Review **message** screen which appears	
* Click the **Yes** button on the message screen	
* Click the **Save** button	
* Review **Status** value – Changed from "Open" to "Shipped"	
* Click the **Home** link	

Classroom 1 - User Specific Data

User ID	Field	Value
Instructor 1	PO Number	0000000473
Instructor 2	PO Number	0000000474
Instructor 3	PO Number	0000000475
User 1	PO Number	0000000476
User 2	PO Number	0000000477
User 3	PO Number	0000000478
User 4	PO Number	0000000479
User 5	PO Number	0000000480
User 6	PO Number	0000000481
User 7	PO Number	0000000482
User 8	PO Number	0000000483
User 9	PO Number	0000000484
User 10	PO Number	0000000485
User 11	PO Number	0000000486
User 12	PO Number	0000000487
User 13	PO Number	0000000488
User 14	PO Number	0000000489

User ID	Field	Value
User 15	PO Number	0000000490
User 16	PO Number	0000000491
User 17	PO Number	0000000492
User 18	PO Number	0000000493
User 19	PO Number	0000000494
User 20	PO Number	0000000495
User 21	PO Number	0000000496
User 22	PO Number	0000000497

Classroom 1 - User Specific Data

User ID	Field	Value
Instructor 1	Receipt No	0000000001
Instructor 2	Receipt No	0000000002
Instructor 3	Receipt No	0000000003
User 1	Receipt No	0000000004
User 2	Receipt No	0000000005
User 3	Receipt No	0000000006
User 4	Receipt No	0000000007
User 5	Receipt No	0000000008
User 6	Receipt No	0000000009
User 7	Receipt No	0000000010
User 8	Receipt No	0000000011
User 9	Receipt No	0000000012
User 10	Receipt No	0000000013
User 11	Receipt No	0000000014
User 12	Receipt No	0000000015
User 13	Receipt No	0000000016
User 14	Receipt No	0000000017
User 15	Receipt No	0000000018
User 16	Receipt No	0000000019
User 17	Receipt No	0000000020
User 18	Receipt No	0000000021
User 19	Receipt No	0000000022
User 20	Receipt No	0000000023
User 21	Receipt No	0000000024
User 22	Receipt No	0000000025

Classroom 2 - User Specific Data

User ID	Field	Value
Instructor 1	PO Number	0000000499
Instructor 2	PO Number	0000000500
Instructor 3	PO Number	0000000501
User 1	PO Number	0000000502
User 2	PO Number	0000000503
User 3	PO Number	0000000504
User 4	PO Number	0000000505
User 5	PO Number	0000000506
User 6	PO Number	0000000507
User 7	PO Number	0000000508
User 8	PO Number	0000000509
User 9	PO Number	0000000510
User 10	PO Number	0000000511
User 11	PO Number	0000000512
User 12	PO Number	0000000513
User 13	PO Number	0000000514
User 14	PO Number	0000000515
User 15	PO Number	0000000516
User 16	PO Number	0000000517
User 17	PO Number	0000000518
User 18	PO Number	0000000519
User 19	PO Number	0000000520
User 20	PO Number	0000000521
User 21	PO Number	0000000522
User 22	PO Number	0000000523

Classroom 2 - User Specific Data

User ID	Field	Value
Instructor 1	Receipt No	0000000027
Instructor 2	Receipt No	0000000028
Instructor 3	Receipt No	0000000029
User 1	Receipt No	0000000030
User 2	Receipt No	0000000031
User 3	Receipt No	0000000032
User 4	Receipt No	0000000033
User 5	Receipt No	0000000034
User 6	Receipt No	0000000035
User 7	Receipt No	0000000036
User 8	Receipt No	0000000037

User ID	Field	Value
User 9	Receipt No	0000000038
User 10	Receipt No	0000000039
User 11	Receipt No	0000000040
User 12	Receipt No	0000000041
User 13	Receipt No	0000000042
User 14	Receipt No	0000000043
User 15	Receipt No	0000000044
User 16	Receipt No	0000000045
User 17	Receipt No	0000000046
User 18	Receipt No	0000000047
User 19	Receipt No	0000000048
User 20	Receipt No	0000000049
User 21	Receipt No	0000000050
User 22	Receipt No	0000000051

Classroom 3 - User Specific Data

User ID	Field	Value
Instructor 1	PO Number	0000000525
Instructor 2	PO Number	0000000526
Instructor 3	PO Number	0000000527
User 1	PO Number	0000000528
User 2	PO Number	0000000529
User 3	PO Number	0000000530
User 4	PO Number	0000000531
User 5	PO Number	0000000532
User 6	PO Number	0000000533
User 7	PO Number	0000000534
User 8	PO Number	0000000535
User 9	PO Number	0000000536
User 10	PO Number	0000000537
User 11	PO Number	0000000538
User 12	PO Number	0000000539
User 13	PO Number	0000000540
User 14	PO Number	0000000541
User 15	PO Number	0000000542
User 16	PO Number	0000000543
User 17	PO Number	0000000544
User 18	PO Number	0000000545
User 19	PO Number	0000000546
User 20	PO Number	0000000547

User ID	Field	Value
User 21	PO Number	0000000548
User 22	PO Number	0000000549

Classroom 3 - User Specific Data

User ID	Field	Value
Instructor 1	Receipt No	0000000053
Instructor 2	Receipt No	0000000054
Instructor 3	Receipt No	0000000055
User 1	Receipt No	0000000056
User 2	Receipt No	0000000057
User 3	Receipt No	0000000058
User 4	Receipt No	0000000059
User 5	Receipt No	0000000060
User 6	Receipt No	0000000061
User 7	Receipt No	0000000062
User 8	Receipt No	0000000063
User 9	Receipt No	0000000064
User 10	Receipt No	0000000065
User 11	Receipt No	0000000066
User 12	Receipt No	0000000067
User 13	Receipt No	0000000068
User 14	Receipt No	0000000069
User 15	Receipt No	0000000070
User 16	Receipt No	0000000071
User 17	Receipt No	0000000072
User 18	Receipt No	0000000073
User 19	Receipt No	0000000074
User 20	Receipt No	0000000075
User 21	Receipt No	0000000076
User 22	Receipt No	0000000077

Activity 8 - Exercise: Create a Return To Vendor (RTV) Against a Purchase Order

Scenario

You are a **Buyer** for your agency and you have created a purchase order in SMART and received 100 steel posts for a project.

Today, you receive a notification that the funding for the project has been cut. Fifty of the steel posts have been used; the remaining fifty steel posts need to be returned to the vendor. The vendor has not invoiced your agency for the steel posts. Upon discussion with the vendor, the vendor agrees to accept the return of the fifty steel posts for a credit to your agency's account. You need to create an RTV against the purchase order in SMART for the return of the steel posts.

Menu Path

Purchasing → Return To Vendor → Add/Update RTV

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require "User specific data", be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Field	Value
Return To Vendor Search: Add a New Value	
Business Unit	17300 (Department of Administration)
* Click the **Add** button	
RTV	
* Click the **Select Receipt** link	
Select Receipt	
PO No.	User specific data
Receipt No	User specific data
* Click the **Search** button	
Select Receipt: Receipt Lines	
* Click the **Sel** checkbox	

* Click the **OK** button	
RTV: RTV Lines	
Action	Credit
Disposition	Ship
Reason	TOO MANY – Too Many Delivered
* Click the **RTV Details** button for the RTV Line	
Distribution Details: Distributions	
Vendor Returned Qty	50
* Click the **OK** button	
RTV	
* Click the **Save** button	
* Review **RTV ID** and **Status** values	
* Click the **Ship RTV** button	
* Review **message** screen which appears	
* Click the **Yes** button on the message screen	
* Click the **Save** button	
* Review **Status** value – Changed from "Open" to "Shipped"	
* Click the **Home** link	

Classroom 1 - User Specific Data

User ID	Field	Value
User 1	PO Number	0000000552
User 2	PO Number	0000000553
User 3	PO Number	0000000554
User 4	PO Number	0000000555
User 5	PO Number	0000000556
User 6	PO Number	0000000557
User 7	PO Number	0000000558
User 8	PO Number	0000000559
User 9	PO Number	0000000560
User 10	PO Number	0000000561
User 11	PO Number	0000000562
User 12	PO Number	0000000563
User 13	PO Number	0000000564
User 14	PO Number	0000000565
User 15	PO Number	0000000566
User 16	PO Number	0000000567

User ID	Field	Value
User 17	PO Number	0000000568
User 18	PO Number	0000000569
User 19	PO Number	0000000570
User 20	PO Number	0000000571
User 21	PO Number	0000000572
User 22	PO Number	0000000573

Classroom 1 - User Specific Data

User ID	Field	Value
User 1	Receipt No	0000000080
User 2	Receipt No	0000000081
User 3	Receipt No	0000000082
User 4	Receipt No	0000000083
User 5	Receipt No	0000000084
User 6	Receipt No	0000000085
User 7	Receipt No	0000000086
User 8	Receipt No	0000000087
User 9	Receipt No	0000000088
User 10	Receipt No	0000000089
User 11	Receipt No	0000000090
User 12	Receipt No	0000000091
User 13	Receipt No	0000000092
User 14	Receipt No	0000000093
User 15	Receipt No	0000000094
User 16	Receipt No	0000000095
User 17	Receipt No	0000000096
User 18	Receipt No	0000000097
User 19	Receipt No	0000000098
User 20	Receipt No	0000000099
User 21	Receipt No	0000000100
User 22	Receipt No	0000000101

Classroom 2 - User Specific Data

User ID	Field	Value
User 1	PO Number	0000000578
User 2	PO Number	0000000579
User 3	PO Number	0000000580
User 4	PO Number	0000000581
User 5	PO Number	0000000582
User 6	PO Number	0000000583

User ID	Field	Value
User 7	PO Number	0000000592
User 8	PO Number	0000000593
User 9	PO Number	0000000594
User 10	PO Number	0000000595
User 11	PO Number	0000000596
User 12	PO Number	0000000597
User 13	PO Number	0000000598
User 14	PO Number	0000000599
User 15	PO Number	0000000600
User 16	PO Number	0000000601
User 17	PO Number	0000000602
User 18	PO Number	0000000603
User 19	PO Number	0000000604
User 20	PO Number	0000000605
User 21	PO Number	0000000606
User 22	PO Number	0000000607

Classroom 2 - User Specific Data

User ID	Field	Value
User 1	Receipt No	0000000107
User 2	Receipt No	0000000108
User 3	Receipt No	0000000109
User 4	Receipt No	0000000110
User 5	Receipt No	0000000111
User 6	Receipt No	0000000112
User 7	Receipt No	0000000113
User 8	Receipt No	0000000114
User 9	Receipt No	0000000115
User 10	Receipt No	0000000116
User 11	Receipt No	0000000117
User 12	Receipt No	0000000118
User 13	Receipt No	0000000119
User 14	Receipt No	0000000120
User 15	Receipt No	0000000121
User 16	Receipt No	0000000122
User 17	Receipt No	0000000123
User 18	Receipt No	0000000124
User 19	Receipt No	0000000125
User 20	Receipt No	0000000126
User 21	Receipt No	0000000127

User ID	Field	Value
User 22	Receipt No	0000000128

Classroom 3 - User Specific Data

User ID	Field	Value
User 1	PO Number	0000000611
User 2	PO Number	0000000612
User 3	PO Number	0000000613
User 4	PO Number	0000000614
User 5	PO Number	0000000615
User 6	PO Number	0000000616
User 7	PO Number	0000000617
User 8	PO Number	0000000618
User 9	PO Number	0000000619
User 10	PO Number	0000000620
User 11	PO Number	0000000621
User 12	PO Number	0000000622
User 13	PO Number	0000000623
User 14	PO Number	0000000624
User 15	PO Number	0000000625
User 16	PO Number	0000000626
User 17	PO Number	0000000627
User 18	PO Number	0000000628
User 19	PO Number	0000000629
User 20	PO Number	0000000630
User 21	PO Number	0000000631
User 22	PO Number	0000000632

Classroom 3 - User Specific Data

User ID	Field	Value
User 1	Receipt No	0000000132
User 2	Receipt No	0000000133
User 3	Receipt No	0000000134
User 4	Receipt No	0000000135
User 5	Receipt No	0000000136
User 6	Receipt No	0000000138
User 7	Receipt No	0000000139
User 8	Receipt No	0000000140
User 9	Receipt No	0000000141
User 10	Receipt No	0000000142
User 11	Receipt No	0000000143

User ID	Field	Value
User 12	Receipt No	0000000144
User 13	Receipt No	0000000145
User 14	Receipt No	0000000146
User 15	Receipt No	0000000147
User 16	Receipt No	0000000148
User 17	Receipt No	0000000149
User 18	Receipt No	0000000150
User 19	Receipt No	0000000151
User 20	Receipt No	0000000152
User 21	Receipt No	0000000153
User 22	Receipt No	0000000154

Activity 9 - Walkthrough: PO Inspection Required Checkbox

Scenario
You are a **Buyer** for your agency and you are reviewing a purchase order for retirement plaques. You need to ensure that the names engraved on the retirement plaques are spelled correctly at the time of receipt. You need to activate the PO Inspection Required checkbox on the purchase order in SMART.

Menu Path
Purchasing → Purchase Orders → Add/Update POs

UPK Procedure
Using the PO Inspection Required Checkbox

Job Aid
Not Applicable

Instructions
Follow along with your instructor as he/she demonstrates how to use the PO Inspection checkbox on a purchase order in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "User specific data", be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
Add/Update POs: Find an Existing Value	
Business Unit	17300 (Department of Administration)
PO Number	User specific data
* Click the **Search** button	
Purchase Order: Lines: Details	
* Click the **Receiving** tab	
Purchase Order: Lines: Receiving	
* Click the **Inspection Required** checkbox	
* Click the **Save** button	
Inspect ID	ECF001 (All inspections)
* Click the **Save** button	
* Click the **Home** link	

Classroom 1 - User Specific Data

User ID	Field	Value
Instructor 1	PO Number	0000000636
Instructor 2	PO Number	0000000637
Instructor 3	PO Number	0000000638
User 1	PO Number	0000000639
User 2	PO Number	0000000640
User 3	PO Number	0000000641
User 4	PO Number	0000000642
User 5	PO Number	0000000643
User 6	PO Number	0000000644
User 7	PO Number	0000000645
User 8	PO Number	0000000646
User 9	PO Number	0000000647
User 10	PO Number	0000000648
User 11	PO Number	0000000649
User 12	PO Number	0000000650
User 13	PO Number	0000000651
User 14	PO Number	0000000652
User 15	PO Number	0000000653
User 16	PO Number	0000000654
User 17	PO Number	0000000655
User 18	PO Number	0000000656
User 19	PO Number	0000000657
User 20	PO Number	0000000658
User 21	PO Number	0000000659
User 22	PO Number	0000000660

Classroom 2 - User Specific Data

User ID	Field	Value
Instructor 1	PO Number	0000000662
Instructor 2	PO Number	0000000663
Instructor 3	PO Number	0000000664
User 1	PO Number	0000000665
User 2	PO Number	0000000666
User 3	PO Number	0000000667
User 4	PO Number	0000000668
User 5	PO Number	0000000669
User 6	PO Number	0000000670
User 7	PO Number	0000000671
User 8	PO Number	0000000672

User ID	Field	Value
User 9	PO Number	0000000673
User 10	PO Number	0000000674
User 11	PO Number	0000000675
User 12	PO Number	0000000676
User 13	PO Number	0000000677
User 14	PO Number	0000000678
User 15	PO Number	0000000679
User 16	PO Number	0000000680
User 17	PO Number	0000000681
User 18	PO Number	0000000682
User 19	PO Number	0000000683
User 20	PO Number	0000000684
User 21	PO Number	0000000685
User 22	PO Number	0000000686

Classroom 3 - User Specific Data

User ID	Field	Value
Instructor 1	PO Number	0000000688
Instructor 2	PO Number	0000000689
Instructor 3	PO Number	0000000690
User 1	PO Number	0000000691
User 2	PO Number	0000000692
User 3	PO Number	0000000693
User 4	PO Number	0000000694
User 5	PO Number	0000000695
User 6	PO Number	0000000696
User 7	PO Number	0000000697
User 8	PO Number	0000000698
User 9	PO Number	0000000699
User 10	PO Number	0000000700
User 11	PO Number	0000000701
User 12	PO Number	0000000702
User 13	PO Number	0000000703
User 14	PO Number	0000000704
User 15	PO Number	0000000705
User 16	PO Number	0000000706
User 17	PO Number	0000000707
User 18	PO Number	0000000708
User 19	PO Number	0000000709
User 20	PO Number	0000000710

User ID	Field	Value
User 21	PO Number	0000000711
User 22	PO Number	0000000712

Activity 10 - Exercise: Using the Purchase Order Reconciliation Workbench

Scenario
You are a **Buyer** for your agency. You receive an email from your Supervisor advising you that you need to cancel the purchase order you recently created for paper hand towels. The purchase order has not been received yet in SMART. Use the Purchase Order Reconciliation Workbench in SMART to cancel the existing purchase order.

Menu Path
Purchasing → Purchase Orders → Reconcile POs → Reconciliation Workbench

UPK Procedure
Using the Purchase Order Reconciliation Workbench

Job Aid
Not Applicable

Instructions
Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require "User specific data", be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Field	Value
Reconciliation WorkBench Search: Add a New Value	
Business Unit	17300 (Department of Administration)
WorkBench ID	CXLPO <insert Classroom number . User ID number>
* Click the **Add** button	
Filter Options	
Purchase Order	User specific data
To:	User specific data – use same value as previous User specific data field
* Click the **Search** button	
Reconciliation WorkBench	
Description	Cancel purchase orders <insert Classroom number . User ID number>
* Click the **Select** checkbox for the purchase order	
* Click the **Cancel** button	
Processing Results	

Proceed?	* Click the **Yes** button
Message Screen	
Continue to Cancel?	* Click the **Yes** button
* Review the **PO Status** value	
* Click the **Home** link	

Classroom 1 - User Specific Data

User ID	Field	Value
User 1	Purchase Order and To:	0000000801
User 2	Purchase Order and To:	0000000802
User 3	Purchase Order and To:	0000000803
User 4	Purchase Order and To:	0000000804
User 5	Purchase Order and To:	0000000805
User 6	Purchase Order and To:	0000000806
User 7	Purchase Order and To:	0000000807
User 8	Purchase Order and To:	0000000808
User 9	Purchase Order and To:	0000000809
User 10	Purchase Order and To:	0000000810
User 11	Purchase Order and To:	0000000811
User 12	Purchase Order and To:	0000000812
User 13	Purchase Order and To:	0000000813
User 14	Purchase Order and To:	0000000814
User 15	Purchase Order and To:	0000000815
User 16	Purchase Order and To:	0000000816
User 17	Purchase Order and To:	0000000817
User 18	Purchase Order and To:	0000000818
User 19	Purchase Order and To:	0000000819
User 20	Purchase Order and To:	0000000820
User 21	Purchase Order and To:	0000000821
User 22	Purchase Order and To:	0000000822

Classroom 2 - User Specific Data

User ID	Field	Value
User 1	Purchase Order and To:	0000000826
User 2	Purchase Order and To:	0000000827
User 3	Purchase Order and To:	0000000828
User 4	Purchase Order and To:	0000000829
User 5	Purchase Order and To:	0000000830
User 6	Purchase Order and To:	0000000831
User 7	Purchase Order and To:	0000000832

User ID	Field	Value
User 8	Purchase Order and To:	0000000833
User 9	Purchase Order and To:	0000000834
User 10	Purchase Order and To:	0000000835
User 11	Purchase Order and To:	0000000836
User 12	Purchase Order and To:	0000000837
User 13	Purchase Order and To:	0000000838
User 14	Purchase Order and To:	0000000839
User 15	Purchase Order and To:	0000000840
User 16	Purchase Order and To:	0000000841
User 17	Purchase Order and To:	0000000842
User 18	Purchase Order and To:	0000000843
User 19	Purchase Order and To:	0000000844
User 20	Purchase Order and To:	0000000845
User 21	Purchase Order and To:	0000000846
User 22	Purchase Order and To:	0000000847

Classroom 3 - User Specific Data

User ID	Field	Value
User 1	Purchase Order and To:	0000000851
User 2	Purchase Order and To:	0000000852
User 3	Purchase Order and To:	0000000853
User 4	Purchase Order and To:	0000000854
User 5	Purchase Order and To:	0000000855
User 6	Purchase Order and To:	0000000856
User 7	Purchase Order and To:	0000000857
User 8	Purchase Order and To:	0000000858
User 9	Purchase Order and To:	0000000859
User 10	Purchase Order and To:	0000000860
User 11	Purchase Order and To:	0000000861
User 12	Purchase Order and To:	0000000862
User 13	Purchase Order and To:	0000000863
User 14	Purchase Order and To:	0000000864
User 15	Purchase Order and To:	0000000865
User 16	Purchase Order and To:	0000000866
User 17	Purchase Order and To:	0000000867
User 18	Purchase Order and To:	0000000868
User 19	Purchase Order and To:	0000000869
User 20	Purchase Order and To:	0000000870
User 21	Purchase Order and To:	0000000871
User 22	Purchase Order and To:	0000000872

Activity 11 - Walkthrough: Review Purchase Order Change History

Scenario
You are a **Buyer** for your agency. You need to investigate the history of an existing purchase order's change history in SMART because your Supervisor has asked you to investigate and verify the shipping location information on the purchase order.

Menu Path
Purchasing → Purchase Orders → Manage Change Orders → Review Change History

UPK Procedure
Not applicable

Job Aid
Not Applicable

Instructions
Follow along with your instructor as he/she demonstrates how to review purchase order change history in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "User specific data", be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise ask the instructor for guidance.

Required Data

Field	Value
Change History	
Business Unit	17300 (Department of Administration)
PO Number	User specific data
* Click the **Search** button	
Header Changes	
* Review all records	
* Click the **Ship Changes** tab	
Ship Changes	
* Review all records	
* Verify the **Ship To Location** information is 694001	
* Click the **Home** link	

Classroom 1 - User Specific Data

User ID	Field	Value
Instructor 1	PO Number	0000000877

User ID	Field	Value
Instructor 2	PO Number	0000000878
Instructor 3	PO Number	0000000879
User 1	PO Number	0000000880
User 2	PO Number	0000000881
User 3	PO Number	0000000882
User 4	PO Number	0000000883
User 5	PO Number	0000000884
User 6	PO Number	0000000885
User 7	PO Number	0000000886
User 8	PO Number	0000000887
User 9	PO Number	0000000888
User 10	PO Number	0000000889
User 11	PO Number	0000000890
User 12	PO Number	0000000891
User 13	PO Number	0000000892
User 14	PO Number	0000000893
User 15	PO Number	0000000894
User 16	PO Number	0000000895
User 17	PO Number	0000000896
User 18	PO Number	0000000897
User 19	PO Number	0000000898
User 20	PO Number	0000000899
User 21	PO Number	0000000900
User 22	PO Number	0000000901

Classroom 2 - User Specific Data

User ID	Field	Value
Instructor 1	PO Number	0000000902
Instructor 2	PO Number	0000000903
Instructor 3	PO Number	0000000904
User 1	PO Number	0000000905
User 2	PO Number	0000000906
User 3	PO Number	0000000907
User 4	PO Number	0000000908
User 5	PO Number	0000000909
User 6	PO Number	0000000910
User 7	PO Number	0000000911
User 8	PO Number	0000000912
User 9	PO Number	0000000913
User 10	PO Number	0000000914

User ID	Field	Value
User 11	PO Number	0000000915
User 12	PO Number	0000000916
User 13	PO Number	0000000917
User 14	PO Number	0000000918
User 15	PO Number	0000000919
User 16	PO Number	0000000920
User 17	PO Number	0000000921
User 18	PO Number	0000000922
User 19	PO Number	0000000923
User 20	PO Number	0000000924
User 21	PO Number	0000000925
User 22	PO Number	0000000926

Classroom 3 - User Specific Data

User ID	Field	Value
Instructor 1	PO Number	0000000927
Instructor 2	PO Number	0000000928
Instructor 3	PO Number	0000000929
User 1	PO Number	0000000930
User 2	PO Number	0000000931
User 3	PO Number	0000000932
User 4	PO Number	0000000933
User 5	PO Number	0000000934
User 6	PO Number	0000000935
User 7	PO Number	0000000936
User 8	PO Number	0000000937
User 9	PO Number	0000000938
User 10	PO Number	0000000939
User 11	PO Number	0000000940
User 12	PO Number	0000000941
User 13	PO Number	0000000942
User 14	PO Number	0000000943
User 15	PO Number	0000000944
User 16	PO Number	0000000945
User 17	PO Number	0000000946
User 18	PO Number	0000000947
User 19	PO Number	0000000948
User 20	PO Number	0000000949
User 21	PO Number	0000000950
User 22	PO Number	0000000951

Activity 12 - Challenge: PO Reconciliation Workbench and SRM Dashboard

Scenario
You are a **Buyer** for your agency. You need to look up and cancel a purchase order using the PO Reconciliation Workbench, and then add the "Dispatched Purchase Orders" menu pagelet to the Supplier Relationship Management Dashboard on your home page.

Menu Path
Purchasing → Purchase Orders → Reconcile POs → Reconciliation Workbench

UPK Procedure
Purchase Order Reconciliation Workbench
Using the Supplier Relationship Management (SRM) Dashboard

Job Aid
Not applicable

Instructions
Use the appropriate steps from the previous Instructor led walkthrough(s) and UPK(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require "User specific data", be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

Field	Value
Reconciliation WorkBench Search: Add a New Value	
Business Unit	17300 (Department of Administration)
WorkBench ID	CANCEL <insert Classroom number . User ID number>
* Click the **Add** button	
Filter Options	
Purchase Order	User specific data
To:	User specific data – use same value as previous field
* Click the **Search** button	
Reconciliation WorkBench	
Description	Cancel purchase orders <insert Classroom number . User ID number>
* Click the **Select** checkbox for the purchase order	
* Click the **Cancel** button	

Processing Results
* Click the **Yes** button
Reconciliation WorkBench
* Click the **Save** button
* Click the **Home** link
Home Page
* Click the **Content** link
Personalize Content
* Click the **Dispatched Purchase Orders** checkbox
* Click the **Save** button
Home Page
* Click the **Layout** link
Personalize Layout
* Review the Personalize Layout page information
* Select the **Dispatched Purchase Orders** option
* Click the **right arrow** button
* Click the **Save** button
Home Page
* Review the Home page with Dispatched purchase orders displayed
* Review layout buttons: Refresh, Customize, Minimize, Expand, Remove
* Click the **X** (**Remove)** button
Removal Confirmation
* Click the **Yes - Remove** button
* Click the **Sign Out** link

Classroom 1 - User Specific Data

User ID	Field	Value
User 1	Purchase Order and To:	0000000953
User 2	Purchase Order and To:	0000000954
User 3	Purchase Order and To:	0000000955
User 4	Purchase Order and To:	0000000956
User 5	Purchase Order and To:	0000000957
User 6	Purchase Order and To:	0000000958
User 7	Purchase Order and To:	0000000959
User 8	Purchase Order and To:	0000000960
User 9	Purchase Order and To:	0000000961
User 10	Purchase Order and To:	0000000962
User 11	Purchase Order and To:	0000000963
User 12	Purchase Order and To:	0000000964
User 13	Purchase Order and To:	0000000965
User 14	Purchase Order and To:	0000000966

User ID	Field	Value
User 15	Purchase Order and To:	0000000967
User 16	Purchase Order and To:	0000000968
User 17	Purchase Order and To:	0000000969
User 18	Purchase Order and To:	0000000970
User 19	Purchase Order and To:	0000000971
User 20	Purchase Order and To:	0000000972
User 21	Purchase Order and To:	0000000973
User 22	Purchase Order and To:	0000000974

Classroom 2 - User Specific Data

User ID	Field	Value
User 1	Purchase Order and To:	0000000978
User 2	Purchase Order and To:	0000000979
User 3	Purchase Order and To:	0000000980
User 4	Purchase Order and To:	0000000981
User 5	Purchase Order and To:	0000000982
User 6	Purchase Order and To:	0000000983
User 7	Purchase Order and To:	0000000984
User 8	Purchase Order and To:	0000000985
User 9	Purchase Order and To:	0000000986
User 10	Purchase Order and To:	0000000987
User 11	Purchase Order and To:	0000000988
User 12	Purchase Order and To:	0000000989
User 13	Purchase Order and To:	0000000990
User 14	Purchase Order and To:	0000000991
User 15	Purchase Order and To:	0000000992
User 16	Purchase Order and To:	0000000993
User 17	Purchase Order and To:	0000000994
User 18	Purchase Order and To:	0000000995
User 19	Purchase Order and To:	0000000996
User 20	Purchase Order and To:	0000000997
User 21	Purchase Order and To:	0000000998
User 22	Purchase Order and To:	0000000999

Classroom 3 - User Specific Data

User ID	Field	Value
User 1	Purchase Order and To:	0000001003
User 2	Purchase Order and To:	0000001004
User 3	Purchase Order and To:	0000001005
User 4	Purchase Order and To:	0000001006

User ID	Field	Value
User 5	Purchase Order and To:	0000001007
User 6	Purchase Order and To:	0000001008
User 7	Purchase Order and To:	0000001009
User 8	Purchase Order and To:	0000001010
User 9	Purchase Order and To:	0000001011
User 10	Purchase Order and To:	0000001012
User 11	Purchase Order and To:	0000001013
User 12	Purchase Order and To:	0000001014
User 13	Purchase Order and To:	0000001015
User 14	Purchase Order and To:	0000001016
User 15	Purchase Order and To:	0000001017
User 16	Purchase Order and To:	0000001018
User 17	Purchase Order and To:	0000001019
User 18	Purchase Order and To:	0000001020
User 19	Purchase Order and To:	0000001021
User 20	Purchase Order and To:	0000001022
User 21	Purchase Order and To:	0000001023
User 22	Purchase Order and To:	0000001024